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ABSTRACT

The six papers compiled here cover issues related to acquisition, library cooperation, and collection development. In "The UK Serials Group: A British Success Story," David P. Woodworth describes the background and work of the Serials Group, an autonomous British organization which aims to bridge the gap between serials producers and consumers. In "The Australian Scene: Cooperation between Libraries and with the Book Trade and Publishers," Derek Whitehead outlines the recent history of cooperation between libraries, the book-trade, and publishers, especially through the Australian Book Trade Committee, and discusses cooperation among Australian libraries in collection development. In "The Swedish Conspectus Project 'SULF'," Jan Hagerlid describes a project aimed at enhancing local capacity to formulate collection development policies. In "National Repository Planning in Scandinavia: The Result of a Seminar," Birgitta Bergdahl gives background on a 1987 seminar on national repository planning, summarizes the current situation of repository libraries in Scandinavia, and offers recommendations and warnings. In "The Acquisition Crisis in Academic Libraries: The Role of Book Price Indices in Budgetary Planning," Rolf Griebel considers the applicability of different types of price indices to budget planning with reference to Anglo-American and West German literature. In "Information Basis of International Book Exchange," Z. P. Sorokina discusses the research on the international exchange of publications. (MES)

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Division of Collections and Services

SECTION ON ACQUISITION AND EXCHANGE

Sessions: 97 Tuesday 10.30 – 12.00
114 Tuesday 15.00 – 16.30

The UK Serials Group: a British success story *(40-ACQUIS-2-E)*	David P Woodworth University of Technology Loughborough UK
The Australian scene: cooperation between libraries and with the book trade and publishers *(39-ACQUIS-1-E)*	Derek Whitehead State Library of Victoria Australia
The Swedish conspectus project 'SULF' *(41-ACQUIS-3-E)*	Jan Hagerlid Swedish Delegation for Scientific and Technical Information Stockholm Sweden
National repository planning in Scandinavia: the results of a seminar *(108-AQUIS-4-E)*	Birgitta Bergdahl Linköping University Library Linköping Sweden
The acquisition crisis in academic libraries: the role of book price indices in budgetary planning *(117-ACQUIS-5-E)*	Rolf Griebel Univerity Library Bamberg Federal Republic of Germany

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THE UK SERIALS GROUP: A BRITISH SUCCESS STORY

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ABSTRACT

The peculiar problems of serials involving a close working relationship between librarians, information workers, printers, agents, binders and other sparked the idea of one single organisation serving the needs of all interested parties and not just one in a vacuum. That the belief that a forum leading to better understanding between all concerned has been successful over the first ten years is instanced by its growth in membership and increasing range of activities such as involvement in courses, the growing list of publications, and increasing frequency with which outside organisations seek advice.

What is a serial? This question has been argued over for many years and has resulted in equally many definitions, none of which have been wholely satisfacotry. That the question has to be asked at all, and that it gives rise to such animated discussion among the cognoscenti is one reason why it was thought that some kind of forum for all concerned in this fascinating area should be formed.

Some 20 years after the second world war there was a great surge in the number of new libraries of all types and this quickly had an effect on new and existing publishers who speedily took advantage of this expanding market covering both new and retrospective publishing. That the serial was the most popular medium for such an increasing publication was due to its recognition as a primary source of up-to-date information, or as up-to-date as you can get in the publishing chain. Additionally the unscrupulour publishers very quickly recognised that they could get away with almost what they asked by way of subscriptions without thought, at that time, that the chicken would come home to roost eventually.

To many librarians then, as now, although a new realisation was very gradually setting in, serials handling was essentially a clerical task which did not rank as an art in the ways that selection, handling and processing of other forms of materials were already recognised. This climate of being second rate percolated to the publishing and editorial side in addition to it being rampant in the consumer side. This situation resulted in a completely fragmented area of publishing where everyone did their own thing without thought to the impact that would be made on the consumer. Consequently many unnecessary, some would say stupid, alternatives where made to format, frequency, and other bibliographical nuances connected with the publishing schedule.

By the end of the 1960's those responsible for establishing the then National Lending Library for Science and Technology were talking knowledgeably about 150,000 or more titles currently published in those two areas without thought to other very broad fields of interest. Here was the first realisation that a colossal weight of information was 'swilling around' in a completely unco-ordinated fashion. Co-incidentally this realisation also hit the United States, but in a more realistic way for the first books specifically on serials appeared, both text and bibliographical, and in 1976 the art of serials librarianship had advanced sufficiently for a special journal to be launched by Haworth Press – The Serials Librarian.

Most of the early 'running' was therefore made in the States. But, as usual, the English were not asleep, just awaiting their chance and judging the right time to jump was the pre-occupation of Blackwells, the Oxford publishers and booksellers. Over the years its Periodicals Division has expanded enormously and by the early 1970's its Director, ex-librarian John Merriman, recognised the continuing lack of contact of all constituent parties in the publication chain which he concluded was to the detriment of all. Accordingly in 1974 Blackwells invited librarians of all Higher Educational Establishments in the UK to a conference in 1975 on "The acquisition of Periodicals in Academic Libraries". To this were also invited representatives of the publishing and agency fields in addition to microform publishers. It was at this conference that the first tentative seeds were sown which lead some years later to the formation of the United Kingdom Serials Group (UKSG). However it was not unitl another conference had been convened under the Blackwell's banner in 1977 that things began to move for at this event a motion was approved by delegates that ad-hoc committee be formed to explore the possibilities of forming a specialist organisation for serials.

At the start it was envisaged as the Serials *Librarians* Group but very quickly it was recognised that this would prove too restrictive and would not meet the purposes as originally envisaged, ie. a multi-disciplinary forum. Accordingly the title was re-considered and the new adopted title became, as it still is, the UKSG.

The ad-hoc committee recognised the difficulties facing any new organisation and was also mindful of the proliferation of such organisations in a small profession in a small country. Afterall the scale of our activities was nothing like the US. Accordingly the major professional associations were approached to allow us to practice under th general umbrella. But not for the first time in the history of these older organisations the conditions they imposed were unacceptable for a membership base such as we envisaged with the result that the decision was taken to form an entirely autonomous organisation. Ten years on this decision has been more vindicated for the Group is thriving and the 1987 conference in Oxford had 360 delegates, almost twice as many as those who attended an older organisations conference some two weeks earlier. Of the delegates about 50% were librarians and 50% from the trade, proof enough of the success of the venture. In addition an increasingly important trade exhibition is a focal point of our activities.

The Group was formally established in York in 1978 where a constitution was adopted and committee elected representing agents, publishers, and librarians. A great deal of credit is due to the firm but informal guidance of our founder Chairmand, Dr David Wood of the British Library Document Supply Centre, whose vast knowledge of serials helped considerably in obtaining a firm base. Also the resources available through the British Library helped considerably as indeed did, and still do, those of Blackwells, Swets, Pergamon and others.

The primary aim was to bridge the gap between the producer and consumer and to provide a forum for the discussion of ideas, suggestions and an avenue of communication between librarians, subscription agents, publishers, binders, and information workers. In order to make these aims clear a series of objectives were formulated which encapsulated our thinking but these have been quietly dropped as being unnessary, if somewhat pompous in their wording. However these can be used conveniently in the context of this paper to explain our activities. Our global aim was to promote and encourage a continuing dialogue with serials and associated areas and in order to obtain the widest possible representation the definition of serial was also treated in its broadest sense. One of our early problems was the 'apparent' geographical limitation as indicated by our name, but we think that, over the years, this has been dispelled, for we now have members in most continents of the world. Indeed the interest we have provoked had a direct influence on the formation of the North American Serials Interest Group and initial moves are now under way for a similar group in Germany. Rumours continue about the liklihood of developments in Scandanavia and Australia which we continue to watch with interest and are always willing to assist. A year ago it was gratifying to note that the National Acquisitions Group (NAG) which obviously overlaps our interests, was formed on the same lines as ourselves and with which we now have close relations. The remaining aims have some bearing on the way the group is run specifically. For instance the development of links between the producer and end user of serials. Over the years more and more problems have arisen from, subscription problems like dual pricing to general areas of production which have been aired to such an extent that all sides have a better awareness of each others problems and attitudes, hopefully for our mutual benefit.

'To encourage professional awareness' if possibly our most difficult gaol – for it recognises the importance of a serial as a primary source of communication whose value is accepted in some fields but is still doubted or misunderstood, in others. So here we have tried, so far with little impact, to influence the teaching at Library Schools. But greater success has been achieved in the many, and varied, courses which we have mounted for lower and higher grade staffs. These have very much proved a need and have filled an area much neglected by the longer established and therefore more traditional, professional organisations. We see our duty extending also to systems design and the encouragement of, and promotion of the wider use of, housekeeping packages, use of bar codes, greater use of International Standard Serial Numbers (ISSN), ordering procedures and other methods leading a greater efficiency and cost benefit for *all* concerned. We have too growing publications schedule.

Research has, until recently, had minimal attention but this area is now beginning to be considered. By research is meant not necessarily grass root surveys like the extent/growth of automation in libraries but also more fundamental longer term projects.

Our final aim is perhaps our most nebulous – that is to be the natural articulator of everything to do with serials. In other words that

everyone should turn to the UKSG for anything and everything on the subject of serials. We have been extremely successful here, receiving enquiries with increasing frequency, requests for liaison, and invitations to serve on committees (ie. British Standards Institution). Our articulation has so far not percolated as far as we would have hoped to the public libraries. I have a feeling that they consider themselves to be in a different league to academic and special libaries. The fact remains that their collective purchasing power for serials is considerable and their information purveying potential very great even if on a different scale from the other two types mentioned. Consequently we regard the area of the public library, and indeed the printing community in general, as still an untapped market whereby we can add to the 400 organisations already members.

In the early days a fee was not levied but as membership grew far faster than we, as a volunteer corps of committee members, could cope with a small charge was made. Over the first ten years this has gradually increased to its current figure of 933, still a small price to pay when set beside other professional organisations. Additionally we now have a paid Administrator and without her services we could not possibly have grown to our present status in such a short time.

However the future beckons and our concern is to maintain the momentum. At our annual conferences we try and involve our membership in our decision making and they help a lot in keeping us close to our members. Our aim to all times has been, and will continue to be, to preserve the friendly and family atmosphere which many of our members comment upon and long may that be so. Even in conferences of the size of our very special Oxford Conference earlier this year, this was retained.

I hope that this paper will have given you some idea of the background to, and the work of, the Group, and convinced you of our success in now being part, an integral part, of the professional scene.

39-ACQUIS-1-E

THE AUSTRALIAN SCENE: COOPERATION BETWEEN LIBRARIES AND WITH THE BOOK TRADE AND PUBLISHERS

Derek WHITEHEAD, *Acquistions Librarian, State Library of Victoria, Australia*

ABSTRACT

The paper outlines the recent history of cooperation between libraries, the book trade and publishers, especially through the Australian Book Trade Committee. The importance of the issue of local ordering by libraries is emphasised, together with the related issues of pricing, local stockholding, and standards of service to libraries. A second part of the paper briefly discusses cooperation amongst Australian libraries in collection development, especially as it relates to collection policies and description and rationalisation of serial holdings. The importance of Australia's current economic circumstances as a catalyst in recent developments is emphasised.

Introduction

Australia is a large, sparsely populated country with a population of only sixteen million, divided between six states and two territories. There is a federal political structure, and our colonial political heritage has meant that the six states of australia did not unite as a single country unitl 1901. By then, each colony had established its own institutions – state libraries, galleries, museums. So Australia has a national library, formally established only in 1960, six state libraries, and nineteen very independent university libraries. Australia is remote from the main centres of English- language publishing and is able to support only a relatively small, though growing, local publishing industry. The book trade in Australia is regulated by legislation which created as many problems as it solves. For all of these reasons, Australia has a greater need for cooperation than most countries, and it is not surprising that there is a great many organisations committed to cooperation in the book trade. [1]

This paper outlines the book trade in Australia, and then deals in outline with two aspects of library cooperation: cooperation with publishers and the book trade, and cooperation with each other in developing collections.

Until the 1960s the book trade in Australia was dominated by overseas- published books. Since then Australian publishing output has grown to about 3500 titles per year, and now has about 44 per cent of the retail book market A$731 million. [2]. However, australian publishing comprises barely three per cent of world wide English-language book publishing, and the country is therefore heavily dependent for most of its books, especially those acquired by libraries, on the United Kingdom and the United States.

In 1972 Australia abolished resale price maintenance and since then there has been no legal regulation of book prices. However, the major influence on the price of books in Australia is the closed market, which exists: [3]

. . . when an overseas publisher assigns to an agent in Australia th e exclusive sales and distribution rights for his books in this country, thereby ensuring that retailers and wholesalers here have to buy that publisher's books from the local agent.

Under the Australian Copyright Act 1958 it is "illegal to import into Australia an American edition of a book for which the British Commonwealth or Australian edition exists." This is also held to include buying direct from a British publisher rather than from his Australian agent. [4]. Libraries are exempt from this provision.

Australian books are perhaps the most expensive in the English-speaking world. The main reasons for this are our relatively high labour costs, the remoteness of Australia from sources of supply, and the closed market, which enables Australian agents to set prices for British books well above the British price.[5] To make the situation wose, the downward movement in the value of the Australian dollar since early 1985 has meant that in 1985 and 1986 the price of books to Australian libraries increased by over 50 percent.[6]

One result of these factos is that Australian libraries often buy their books from overseas library suppliers; this trade was estimated in 1984 to be woth A$25 million, and may now be closer to A$35 million. Academic libraries alone probably spend over half of their $46 million book funds with overseas suppliers.[7]

Libraries, Publishers and booksellers

In 1973 the National Book Council (NBC) was founded to unite individuals and organisations with an interest in books, and since then has provided a broad forum for libraries and the book trade.[8] A further stage in cooperation began in 1981, with the establishment of the Joint Standing Committee on the Book Trade (JSCBT), renamed in 1985 the Australian Book Trade Committee (ABTC).

The Committee was established by the Library Association of Australia (LAA), the Australian Booksellers Association (ABA) and the Australian Book Publishers Association (ABPA). It was initially chaired by Denis Richardson, Librarian of the University of Melbourne, with a brief to "consider matters affecting the publication and/or distribution of books and associated materials within Austalia which may be of concern to the constituent bodies", to refer issues to the constituents, and to consider matters raised by them.[9] It was widely seen as a device to encourage libraries to order more from local suppliers, and this view finds some justification in the committee's early activities.[10]

Local Ordering

The JSCBT arose out of a seminar on local ordering in 1981[11], went on to hold its own Workshop on Local Ordering in 1982[12], and held Local Library Purchase meetings in Melbourne and Sydney in 1983.[13] Australian libraries have ordered overseas for three main reason: lower prices, better availability of stock, and better standards of service and reporting. These three issues have been addressed by the JSCBT.

The issue of price has always been important, and remains so. At the 1981 seminar Pam Trier noted that the price situation had improved because "a growing number of overseas publishers are now making their stock available through Australian agents at close to the net converted overseas price . . ." However, she warned, reverting to the issue of service, "this market is only attractive as long as stock is held locally, and as long as agents are able, willing and competent to supply the orders."[14] The improved price competitiveness of Australian library suppliers had occurred in part through the work of the Australian library supplier, James Bennett, in securing favourable terms from agents. In 1975, 65 publishers had agreed to supply their stock on terms which enabled Bennett to compete with overseas suppliers; by 1981 the number had risen to 286. However, Bennetts still had complaints to make about at least some publisher' agents: they were slow, and their stockholding was often poor.[15]

The ABTC has always supported the closed market, while attempting to make the Australian book trade more competitive. The advantages of the closed market are clear. It permits the growth of an Australian industry, encourages more extensive stockholding in Australia together with more efficient supply at reasonable prices; and profits from distribution of overseas titles have been used in Australia to finance the publication of Australian books.[16] However, many libraries find direct overseas supply to be cheaper, quicker, and

accompanied by a more comprehensive range of services.[17]

One response of the ABTC has been to seek standards of order reporting by Australian stockholders. Draft standards were widely discussed in 1982, and in 1983 consensus had been reached, and the standards were published.[18] In 1985 they were adopted by the Standards Association of Australia, the first Australian standard for the book trade.[19] The order reporting standards are a notable achievement, and could be considered for adoption by other countires; a copy is appended to this paper.

Another library concern addressed by the ABTC was library supplier standards. It was envisaged that a group of specialist library suppliers would emerge, committed to conforming to agreed standards of operation and able to compete with overseas suppliers. The Library Supply Group which was created [20] has had an uncertain history since 1983, but a greater awareness of standards of publisher and library supplier performance has, combined with an improvement in price competitiveness, meant a growing market share for Australian suppliers, at least up to 1985.

Other Issues in Cooperation

The ABTC and its predecessor have taken up a variety of other issues. One of the first was the announced intention of the Australian Government, in 1981, to impose a 2½ per cent sales tax on books. The Please Don't Tax Books campaign was primarily waged by the National Book Council, and succeeded in averting imposition of a sales tax.[21]

A more recent area of close cooperation has arisen since the adoption of the BISAC (Book Industry System Advisory Committee) standard as a US standard. In 1986 the ABTC established a BISAC Study Committee respresenting its three constituent organisations and the National Library of Australia. The Committee has also begun consideration of the SISAC (Serials Industry System Advisory Committee) standard, and of SAN (standard address numbering).

In 1981 the NLA established a national online bibliographic system, the Australian Bibliographic Network (ABN). This is both a database for cataloguing and, increasingly, an online national union catalogue. The relationship between ABN and the book trade was first discussed in 1982, but progress towards cooperation has been slow. Only in 1987 were links formed between ABN and the two commerical book trade databases, Lynx and Booknet. Both of these provide in-print information online, and both can now be accessed by members of ABN, who will be able to use the systems to order online. It has been seen as highly desirable that publishers add information about stock holdings to these databases, and the ABTC has proposed a standardised stock holding code for this purpose. Although the code has proven acceptable to most publishers, and will be used in Booknet, Australian stockholding circumstances mean that it will need to differ from the BISAC code. Another significant problem will be the gathering and updating of stockholding data from a large and diverse group of publishers and agents.[22]

Finally, a perenniel issue of concern, especially to authors and publishers, is the degree to which Australian libraries buy Australian books. This issue arises in debate from time to time, and was most recently discussed at a seminar sponsored by the LAA, and the ABA and the NBC.

Cooperation between libraries, publishers and booksellers has now moved beyond the initial concern with building up a viable library supply industry in Australia to a broader range of issues. However, Australis's recent financial problems have probably set back some of the work completed four years ago, and we have yet to see the full fruit of those efforts.

Library Cooperation in Collection Development

By comparison with other countries, and particularly with the work done by the Research Libraries Group in the US, cooperative collection development amongst Australian libraries is in its infancy. Because of Australia's remoteness it has historically worked towards as great a degree of national self-sufficiency in library resources as possible. The Australian dollar crisis has now made this policy impractical, if it ever was practical. Cooperation in the development of library collection is now being forced on research libraries by the need to create a national resource through cooperation, rationalisation and specialisation. A key element in this will be ABN, especially in tis role as a union catalogue. The system already has 42,000 serials records mounted, and will include the whole of the National Union Catalogue of Serials online by 1988.[23]

Several areas are emerging as important. They are the publication of collection descriptions and policies as a basis for specialisation in collecting; rationalisation of serials holdings; and an effective inter-library loan network. The last issue is beyond the scope of this paper, and it is only possible in a paper of this length to deal very briefly with the two main issues. Nor has there been space to deal with the many instances of cooperation amongst non-research libraries, such as the subject specialisation, joint acquisitions and cooperative storage activites amongst Victorian public libraries.

Collection Policies

The publication by the National Library of its selection policy in 1981[24] was the beginning of a trend towards greater sharing of information about collection policies. However, while the four-level collection description model adopted by the NLA has since been used as a model by a number of other libraries, the NLA model was inadequately described, and two other systems are now also in use. It now appears that Australian university libraries will adopt the RLG consepctus, which has the advantage of being already well-developed.[25] Unlike the situation in the US, where the conspectus has not, on the whole, been used as a basis for reductions in spending[26], Australia is being forced into this situation by a decline in its libraries' purchasing power.

In 1986 Victorian libraries published a directory of their collection strenghts[27], and this model seems likely to be followed in other states. The Victorian directory suffers, however, from the lack of sophisticated collection description structure, and the use of the inadequate NLA levels instead. There is a great deal or work to be done bfore an adequate national model exists, but CAUL now plans to "work with appropriate National, State and Regional bodies in developing collection levels guidelines for Australia, including criteria for assessing collection.[28]

Although some work has been done in the areas of collection description, policy formulation and collection levels, little actual cooperative development of collections has yet occurred. One effort was a national seminar on collecting Western European imprints, held in 1985. It aimed to investigate the current state of Western European imprint collections and the possibilities for rationalisation and coordination. One conclusion was that only 15-20 per cent of appropriate titles in the major languages were acquired by and library in Australia, and that the NLA was by far the major resource. For example, a survey showed that two-thirds of Italian titles held in Australia were held by the NLA.[29] Events have shown that this area of purchasing is highly vulnerable to expenditure cuts, and over the last year the NLA has drastically reduced its spending on Western European imprints as a result of budget pressures.

Serials Rationalisation

Efforts at rationalisation of serials holdings have been handicapped by the urgent need of many libraries over the last two years to cancel substantial numbers serials, and do so quickly in order to avoid overcommitment of funds. This urgency has often prevented any useful consultation, and currently the National Library is involved in the cancellation of up to a third of its serial subscriptions in order to save about A$1 million. Within Victoria, the Resources Subcommittee of AACOBS is now considering the adoption of a set of standard procedures for consultation before cancellation of serials, and is endeavouring to obtain agreement for systematic consultation. There is also a need for a method by which institutions would agree to firm commitments to maintenance of particular serial subscriptions over an agreed period; such a scheme is now being developed in South Australia.

Conclusion

It has only been possible to mention a few of the aspects of cooperation within Australian libraries and the book world. Our circumstances do not make cooperation easy or straighforward. Cooperation is seen as an essential measure in the enhancement of the quality of national library resources, and in building up a flourishing Australian book industry. However, it will have become obvious in the course of this paper that the main pressure for cooperation today comes from the economic pressures on libraries and the book trade which have followed the slide in the value of our currency. When the current crisis has passed, however, we will hopefully be in a much better position to work together for the development of an industry of significance for all Australians, and of Australia's library resources.

References

1 The major national and regional organisations concerned with libraries and the book trade are:

AACOBS Australian Advisroy Council on Bibliographical Services

ABA Australian Booksellers Association

ABPA Australian Book Publisher Association

ABN Australian Bibliographical Network

ABTC Australian Book Trade Committee

ALIA Australian Library and Information Association

ALIC Australian Libraries and Information Council
ALPC Australian Library Promotion Council
CAUL Committee of Australian University Librarians
CAVAL Cooperative Action ofr Victorian Academic Libraries
CLANN New South Wales library network
JSCBT Joint Standing Committee on the Book Trade (now ABTC)
LAA Library Association of Australia (now ALIA)
NBC National Book Council
NLA National Library of Australia

2 *Australian book scene*, 1986-87, p.11. See also "Australianpublishing, 1985", *Acquisitions*, v.3(1) (Mar. 1986). James Bennett Library Services Ltd supplied 4,336 Australian titles in 1985, with a listprice of $75,089 and an average price of A$17.34. In comparison, US book supplied averaged A$48.16 and British books averaged A$35.37.

3 MACKARELL,B., "Closed market and local ordering", in International Booksellers Federation, 25th Anniversary Congress, Melbourne, 23-27 March, 1981. *Papers and proceedings*. Melbourne: D.W. Thorpe, 1981. p.46.

4 ZIFCAK, Michael, "The bookselling scene", *Publishers weekly*, Apr. 26, 1985, p.34.

5 THOMPSON, Frank W., "A lively industry – with room for outsiders", *Publishers weekly*, Apr. 26, 1985, pp. 26-27.

6 MONASH UNIVERSITY LIBRARY, *Average cost movement indexes*, 22 April, 1987 gives the following information:

Period	Index (1981=100)
1982	123.4
1983	130.0
1984	126.9
1985	156.7
1986	193.4
1986/87 (Apr.-Mar.)	201.4

See also COOK, Brian, "Acquisions, library budgets and the Australian dollar" *Australian academic and research libraries*, Dec. 1986.

7 ZIFCAK, *op.cit.*,, p.36. See also JSCBT – DOC 14/83.

8 The NBC represents authors, publishers, booksellers, libraries and individual members, with the aim of promoting the use of books, especially Australian books.

9 JSTCBT – DOC 1/81.

10 ZIFCAF, *op.cit.*, p.36.

11 International Booksellers Federation, 25th Anniversary Congress, Melbourne, 23-27 March, 1981. *Papers and proceedings*. Melbourne: D.W. Thorpe, 1981.

12 JSCBT – DOC 15/82.

14 TRIER, Pam, "A university librarian's view", in International Booksellers Federation, *op.cit.*., p.32.

15 KELLY, B., "A major library supplier's view", in International Booksellers Federation, *op.cit.*, pp.50-54.

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18 TRIER, Pam, "Give us a go: buying your books locally", *Australian bookseller and publisher*, Oct. 1983, pp.31-33.

19 STANDARDS ASSOCIATION OF AUSTRALIA, *Reporting outstanding orders (in the book trade)*. (AS2807-1985). North Sydney: SAA,1985.

20 See JSCBT – DOC 15/82. The document sets out seven criteria for a specialist library supplier, adherence to which would be necessary for membership of proposed Library Supply Group of the ABA.

21 "Australian publishing rides the recession", *The Bookseller*, 14 May, 1983, p.1763.

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23 *ABN news*, no.31 (Jan.-Feb. 1987), p.1.

24 *National Library of Australia selection policy. Canberra: NLA, 1981. (Development of resource sharing networks: Networks study, no.17).*

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26 STAM, David H., "Collaborative collection development: progress, problems, and potential", *IFLA journal*, 12(1986), p.18.

27 THAWLEY, John and KENT, Philip (comps.), *Directory of collection strengths in Victorian Libraries*. Melbourne: Library Association of Australia, Acquisitions Section, Victorian Group, 1986.

28 CAUL, *op.cit.*

29 WHITEHEAD, Derek, "Italian imprints in Australian libraries", *Multicultural libraries*, v.6(1-2) (Dec. 1985), p.19.

Appendix

REPORTS ON OUTSTANDING ORDERS TO BE USED BY LIBRARY SUPPLIERS AND AUSTRALIAN PUBLISHERS OR AGENTS OF OVERSEAS PUBLISHERS

Publishers and agents are requested to show the current status of the order (ie OR — Order recorded, OC — Order cancelled, or PA — Please advise) and to include the expected date of publication or availability of the title in Australia if this can be ascertained. Reports such as TOS (Temporarily out of stock) or TOP (Temporarily out of print) should not be used.

	REPORT	STATUS OF ORDER WITH THE PUBLISHER	EXPECTED FULFILMENT OF ORDER (if possible)
1 NOT YET PUBLISHED This report should be used where the title has not yet been published in the country of original publication (including Australia). An expected date of publication in that country should be given if possible. Do not confuse with reports 2, 13 or 14.	NYP NYP	OR OC	Due (date) in UK/USA
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41-ACQUIS-3-E

THE SWEDISH CONSPECTUS PROJECT "SULF"

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ABSTRACT

The Swedish experience of project work inspired by the concept is discussed. the 'SULF' project, 1984-1985, involved the six Swedish university libraries and the Royal Library. It aimed at enhancing local capacity to formualte collection development policies and also wanted to test the conspectus model and standard. Two subject fields were covered, History and Biochemistry.

The participants had a postive experience of working with collection development in a more systemtic way of the active interest from faculty. History clearly was a more frutful subject for conspectus work than Biochemistry. The present Swedish debate on future amabitions in this field is referred. In general, the Swedish experience shows that succesful conspectus work demands thorough training and ongoing support to the libraries involved and that a national conspectus project is best motivated by starting from local interest.

The library profession around the world is slowly staring to learn a new word: 'conspectus'. Its origianl meaning in Latin is, among other things, overview. In the project initiated by the Research Libraries Group its meaning has been specified to a subject devided, detailed overview of collections and current collecting levels within a group of libraries. One might argue that 'conspectus' is just a new word for an old thing. I prefer to use it as a distinct, new general concept.

The RLG Conspectus, noew North America Collections Inventory Project (NCIP) was presented quite exhaustively to IFLA in 1985 by David Stam. (1) My purpose here is to discuss a Swedish project inspired by the conspectus concept. The Swedish experience might give some fuel to the debate on whether the conspectus can be exported outside North America. But it is not easy to sort out the general conclusions from the specific Swedish problems. Discussions about the conspectus tend to be confused because people talk about different aspects of the whole concept without realizing it. I threfore suggest that we should distinguish between the model for coordination, the standard terms and the methodology.

Libraries participating in conspectus work get a detailed piture of each others collections and collecting profiles. This brings about better coordination both by the combined effect of more enlightened local adaptions to the whole and by special agreements, for instance to safeguard 'endangered subjects'. For many important subject fields the conspectus will show thst there already is enough libraries collecting on a high level and thus that no actions are needed. This is the model, very simplified.

The conspectus provides a standard for collection development policy. It has defined 5 levels of collections and collecting intensity which are combined with language codes and scope noted. Each library in principle assigns its own values to all of the subject divisions

in the conspectus. The NCIP now holds more than 5 000 subject divisions. This gives an idea of the degree of detail which can be applied in a conspectus project. Frequently, subject specified guidelines interpret the level codes in terms of the typical material of a given subjecr, dor instance stating the expected coverage in percentages of standard bibliographies or indexes.

Finally, a certain methodology is associated with conpectus work. In so called verification studies samples of references form carefully chosen sources are checked against the holdings of participating libraries to assess the objectivity methods of data and to measure overlap. Other quantitavie or qualitative methods are also advocated. In conspectus work the choice of methods is limited by the great number of subject divisions. The evaluation has to apply to narrow subject fields and be very simple for the individual library to effectuate.

The Swedish background

Research library cooperation in Sweden has a long history. Our national union catalogue dates from 1886. Today foreign acquisations as well as the national literature are registered in LIBRIS, the national bibliographic database for research libraries. The system for interlending is well established. From the fifties onwards Sweden took part in the Scandia plan, where acquisitions in certain, rather peripheral subjects were to be distributed between some Nordic research libraries. Today Noridc cooperation as taken other forms. In the eighties a system of national subject libraries was officially sanctioned by the Swedish parliament. It was intended to raise the level of library service in some broad subject fields of national importance. In reality the system has been slow to get off the ground, only a few libraries as yet have been assigned this role and little extra funding has been provided.

The research library system in Sweden is decentralized. Decisions on funding for university libraries are made by each university. Within the universities almost half of the total resources for aquisitions are controlled by autonomous department libraries. Especially since around 1970 materials budgets have been shrinking relative to output, costs and demand, reaching an all-time low in 1983 when libraries were hit both by the high dollar rate and the devaluation of the Swedish crown. There is definitely a need for measures to maximize the use of library materials resources locally as well as nationally. The primary reason for libraries to engage in concpectus work has been to find new ways to coordinate acquisitions within universities.

Collection Development Policy at Uppsala University

In 1981 Uppsala University Library embarked on a pioneer effort to create a collection development policy for the entire library system of the university, including the departmental libraries. The ALA 'Guidelines for the formulation of collection development policies' were used as a model. No research library till then had anything but the most general guidelines for its aquisitions. There was also very little experience of systematic collection evaluation. The project started with a large scale use study of the Main Library coupled with an effort to collect more informative aquisitions statistics through the LIBRIS system. (2,3) We chose Law for our first collection development policy and then went on to the Social Sciences, where organizational framework was far more complicated. Our method of work relied heavily on faculty participation – in evaluating collections, describing usersneeds and clarifying the roles of departmental libraries and the main Library. It was harder to engage a wider group of library staff in the project. This probably reflected the absence in Swedish libraries of positions like bibliographers or Fachreferente with a dominating subject content.

The 'SULF' project

The Uppsala project was supported by the Delegation for Scientific and Technical Information (DFI) with the intent of creating a model for similar work in other libraries. In 1983 the project team in Uppsala got DFI support for a national project involving the six Swedish university libraries and the Royal Library. It became known as 'SULF', and acronym that literally reads 'cooridnation development of local collection development policies'. It was essentially aimed at enhancing local capacity to formulate collection development policy. Coordinated by the project team in Uppsala all the participating libraries were expected to create their own collection development policies in the same subject. Secondly, the project wanted to test of the applicabibility of the ALA Guidelines and the Conspectus model for coordination.

The subject chosen for the first year was History. (3,4) It was regarded as important by all libraries and it was to fall within the domains of any national subject library. Several seminars and working meetings were arranged by the project coorindators in Uppsala. Paul Mosher, one of the leading figures in the RLG Conspectus Project, was invited to do a two week consulting tour. A Swedish historian lectured on the post-war intellectual and organizational history of his subject. We worked out a subject structure using the Swedish system of classification, outlined some common gathering of data like shelflist measurements, journal listings and verification studies and also discussed a Swedish translation of the standard definitions in the RLG Conspectus. The individual libraries were encouraged to cooperate with relevant university departments and experiment with different kinds of evaluation methods. The work was usually directed by the Head of the Acquisition Department who was assisted by a project secretary with a 50% salary from DFI. The formation of a wider project group within the library was encouraged but only materialized in a few cases.

What did the project achieve? Local collection development policies for History and allied subjects were formulated according to a common model. These included passages about research profile, user needs, coordination between the Main Library and departmental libraries, general priorities in terms of chronology, geography, type of material etc. and an overview arranged by subject divisions that was also reported to the national History conspectus. These were the concrete, material results. More important was that the project fulfilled its basic educational purpose. The participants had gained news experience in working with collection development in a more systematic way, trying out different evaluation methods and cooperating with faculty on a new level. The generally positive and active interest from faculty should also be underlined. The translation of the conspectus standard definitions was adopted for the time being. Some problems were discused but not finally resolved. One was the use of language codes and the way of adapting them to Swedish condidtions. Another was the tendency of reported conspectus data to cluster in the middle of the scale. One solutions might be to divide the instructional level in two. Our History conspectus gave a much more precise overview of the field and clearly demonstrated the need for coordination on the national level. Whether it really achieved a closer coordination is a question for the future. At the same time the lack of well planned local core collections was pointed out. Finally, we got a very broad picture of literature use among Swedish historians and could report those findings to our leading history journal.(5)

The Biochemistry conspectus

For the second project year Biochemistry was chosen in contrast to History. The kind of guidelines used in the RLG Conspectus were considered too mechanical. Instead citation data were used to create several journal lists of different levels. It was found that a large share of all research materials was concentrated to a small number of core journals. Almost all of these were present in all libraries. The dominance of rather broad journals also meant that only a very rough subdivision of the subject as a whole was meaningful. In all, the conspectus overview did not differentiate very much among the libraries involved and could not open up any new ways of sharing resources.

Discussion

Since the 'SULF' project ended in the beginning of 1986 a debate is going on about our ambitions for the future. Some of the 'SULF' libraries are proceeding to create comprehensive local collection development policies while others are more passive. Most libraries, at least in principle, realize the need for local policies. The arguement mainly concerns the possible use of conspectus as an instrument for coordination at the national level. I will be reffering to this debate in trying to draw some general conclusions.

Some problems might be specific to Sweden. Having a body of subject specialists within libraries makes the task of formulating collection development policies much easier. The work load can be divided on many hands and one can rely on informal knowledge to a large extent. Swedish libraries are now moving towards a more subject based internal structure but there is still some way to go. Another problem is that all of our research libraries at the moment are so absorbed in installing local automated systems that noa energy is left to other new efforts. The lack of a central authority with any real power combined with shrinking library materials resources also creates a tough climate for national coordinations.

It is often that the LIBRIS database already is satisfactory instrument for national coordination of acquisitions. LIBRIS certainly has a national coverage that could be envied in many other countries. It has also recently been equipped with routines for the continous

production of acquisition statistics form the catalogue input to the database. You can make quantitative comparisons between libraries, do overlap studies, get average prices and other nice data. But a level code in a conspectus is a qualitative assesment relative to user need and publishing output in a given subject. It also entails an obligation to keep a certain level of collecting intensity, at least until the code is changed, and can thus provide a basis for coordination. LIBRIS therefore is an excellent support but not a substitute for a conspectus.

Another point is that our long union catalogue tradition limits the possible role of a conspectus as a reference aid in interlending. A few other arguements I will just mention briefly:

- 'Other budget only permits us to buy on direct demand from users.'
- 'User needs change so quickly that planning is meaningless.'
- 'With modern communication technology it does not really matter where materials are collected as long as you have bibliographic access.'

The common denominator here is that the library in fact disclaims its responsibility for any planned collection building.

General conclusions

There are finally some of our experiences I belive to more general. Describing collections and collecting in standard codes does not come natural to most librarians. There are several problems. For one thing librarians are used to work with exact descriptions of single titles. Level codes refer to groups of material and they can never be applied exactly. A change of attitude is demanded. One has to learn to accept a reasonable, working degree of exactness or objectively. The level codes are also formulating systematically, representing an ideal, planned collecing activity. But real life collections are often haphazard and maybe complementary to other collections. it is symptomatic that people find it much easier to attach level codes for collecting intensity than for collections. There is also the problem of interperting the level codes for different subjects and types of material. Here the NCIP has come a long way in developing subject specified guidelines. Probably the conspectus standard can be clarified in a number of ways, but there should also be set a limit to elaboration. We have to realize that it never can be as exact ar cataloging rules.

All this goes to say that training and continous supoport from an experienced central project staff is very important to the success of a conspectus project. We had little training when we started the SULF project. We benefitted a lot fom the help of Paul Mosher but we could not really give the participating libraries the ongoing support they needed.

A final comment concerns the motivation of libraries to engage themselves in a conspectus project. It is quite natural that local considerations are given the highest priority. Creating your own collection development policy usually gives some immediate rewards. You get a deeper knowledge of your collections and your users. It promotes better and more intensive contacts with your faculty. Problems of coordination within the library system can be straigntened out. The possible benefits from a closer coordination with other libraries are more long-term. On the other hand, formulating a collection development policy completely on your own is very time consuming. It is a bit like reinventing the wheel. Work will progress much faster if you have standard definitions, ready made subject divisions and evaluation instruments like verificatin studies, support dor staff training and a possibilty to compare you judgements to those of other libraries. This brings us back to conspectus. Even if all other arguments fail to convince, the support for local collection development is a motivation enough for a national conspectus project.

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NATIONAL REPOSITORY PLANNING IN SCANDINAVIA: THE RESULT OF A SEMINAR

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ABSTRACT

In April 1987, the IFLA Acquisition and Exchange Section was the joint organizer of a seminar on national repository planning in Oslo. The paper gives the background to the seminar, summarizes the present position with regard to repository libraries in Scandinavia, gives recommendation and sounds some warning notes. The Section plans further work in this area.

IFLA's Section on Acquisition and Exchange includes the topic of respository libraries in its medium term program. It aims to assist the development of guidelines and criteria for establishing repository libraries. One way to accomplish this is to find models and solutions that could be of use to different countries. As a starting point for this work the Section arranged a regional seminar in Oslo, Norway, in April 1987 to stimulate an exchange of ideas and experiences between representatives of the Nordic countries. This meeting will be followed by others, among them an international seminar prior to the IFLA Conference in Paris in 1989.

The Nordic Federation of Research Librarians, NVBF, was jointly responsible for arranging the Oslo seminar which was hosted by the Norwegian Library Association, and sponsored by the Nordic Council for Scientific Information and Research Libraries, NORDINFO. NVBF intends to promote work in this area within the Nordic countries by arranging local seminars etc.

The tradition of library cooperation in the Nordic countries is very old and concerns not only cooperation within each country, but also *between* them. The repository library question is essential to the national plans for the future of both public and research libraries in the different Nordic countries, and consequently the seminar was met with lively interest. Twenty-five librarians and library managers from different types of libraries and library institutions in Denmark, Finland, Norway and Sweden took part.

The seminar was introduced by Maurice Line from the British Library, and Lars-Erik Sanner from Stockholm University Library, both deeply involved in questions concerning UAP (Universal Availability of Publications). The remainder of the two day session was devoted to describing the present situation as regards repository libraries in each Nordic country, to presenting existing national plans for the future, and to a discussion about the way ahead.

Scope and limitations

Since the question of the storage, preservation and accessibility of the national imprint in all of the Nordic countries is the concern of their national libraries and covered independently, it was decided to exclude the national imprint from the discussions. They concentrated instead on the need for research libraries to cater for less frequently used foreign literature, which is a very important part of the material collected by libraries in the small Nordic countries. Discussions also dealt with the need for public libraries to store and make available material which cannot be kept locally or which is difficult to borrow from research libraries. In the Nordic countries the research library system and the public library system are quite separate.

The present situation

As Maurice Line pointed out in his introductory internatinal survey, much has been planned and proposed but little has been achieved when it comes to repository libraries. Most interest has been shown in the Socialist countries with the Nordic countries running a close second. Repository libraries do in fact already exist in the Scandinavian countries today. In Denmark, the law regulating public library conditions also includes regulations for a repository library.

This Central Storage Library for Danish Public Libraries constitutes in fact *the* successful example of respository libraries in Scandinavia so far. It was established in 1968 and is one of the central institutions in the Danish library service. Its objectives are to act as a common store for the public libraries, to act as a lending library and to function as a redistribution center for copies of literature reeived. The repository takes over ownership of deposited material, is financed by the State, and has a budget of some seven million Danish Crowns. Twenty persons work in the repository, handling some 150,000 volumes and

40,00 loans a year. It is housed in a large building with ample space for new additions.

The big repository library for research libraries in Stockholm and for Uppsala University Library, the State Repository Library, is another example of a big repository undertaking. Its building has been enlarged twice, and can now house no less than 120,000 metres of literature! Plans to transform this cooperative storage to a more service-oriented, regional lending library with some important collections commonly owned and handled have unfortunately not been realized. However, its periodicals will soon be catalogued in the Swedish cooperative biliographical database LIBRIS, and direct access to these collections will thus be facilitated.

In Finland, the Ministry of Education has just approved a proposal to establish a big repository library for public *and* research libraries. It aims to be a permanent solution to the storage problems of academic and public libraries and to provide good storage conditions. The collections will be catalogues, and a staff of 16 will be in charge of the service.

Apart from these big enterprises there are several smaller repositories for research libraries in Norway and for public libraries in Sweden.

Recommendations

A repository library can be a good solution to the question of how to ensure the continuing provision of literature in a country of region while enabling individual libraries to dispose of stock. It can be cost-effective, and it can provide good storage conditions, good working conditions, security and a good lending service.

But: there are many obstacles to rational national plannin, many of them of an administrative character. Very often overall economic considerations are not allowed for because different bodies pay for different things. Such obstacles must be overcome. National repository planning must be part of a general plan for acquisitions, weeding and storage. It would seem desirable to involve libraries with special subject responsibilities – if such exist – in this process.

It is further recommended that:

- Respository libraries should take over ownership of material, responsibility for weeding it, etc.
- Loans from repository libraries should preferably be handled directly, not through the depositing library.
- Collections should be catalogued if possible, and the catalogue made widely available. When the Danish repository library distributed its catalogue on microfiche, the proportion of loans which it satisfied rose from 60% to 90%, and the total number of requests increased greatly in the long term.
- When a repository library is established staff in the local libraries must be given time for weeding, must have the competence to do it, and must be allowed to weed their collections.

Warnings and concluding reflexions

Small, scattered repositories seem to present a very bad solution to the problem of storing and providing literature. The goals and objectives when establishing a repository library must be clear:

- Repositories should not be a substitute for space that is needed locally
- They should not be a substitute for good union catalogues, and should not take on reference or clearing house functions.
- Repositories should not store material just because no one at the local library takes on a weeding responsibility.
- Repositories must not become obstacles to de-acquisition.
- Good catalogues or union catalogues may reduce the need for repositories.

117-ACQUIS-5-E

The Acquistion Crisis in Academic Libraries: The Role of Book Price Indices in Budgetary Planning

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ABSTRACT

Academic libraries are faced with increases in prices with which budgets are failing to keep pace. There is an urgent need therefore for the differentiated analysis of price trends in the individual publishing regions, in order to obtain meaningful and statistically reliable data for the compilation and justification of budget projects – a task which can only be fulfilled through international cooperation. The applicability of different types of index to budget planning is discussed with special reference to Anglo-American and Federal German literature.

National indices present the price trends for the total book output in a given publishing region, but as they are based on the publisher's original price they reflect only the primary price rises. Amongst the academic indice, which report exclusively on the prices of academic literature, the vendor indices based on approval-plan data are particularly important. Local indices, being based on the individual acquisitions profiles go beyond the primary price rises and cover the secondary pricing factors present in the acquisitions process. Local indices, to which national and academic indices are complementary, are a useful control instrument for budget planning, since they facilitate both the differentiated interpretation of trends in costs and the forecasting process.

1. Academic libraries are faced with increased book production and more especially increased prices with which budgets have failed to keep pace by a long way. The publishers' policy of "dual pricing" aimed at maximising profit, and increasingly strengthened through commercio-political measures to combat "buying around", have forced general price rises as a consequence of the international nature of acquisitions policy and mutual knock-on effects. Close cooperation between acquisition librarians has shown itself to be necessary, not only in relation to "dual pricing" but also in relation to the documentation of price rises in the individual publishing regions, Differentiated reporting of trends in prices and also of the rise in literature output are the basis of budget planning in libraries, and budget plans present to financing bodies are all the more convincing if the projections are supported by meaningful data about trends in prices.

2. In the following paper, concentrating on Anglo-American and Federal German literture, consideration will be given to the function of types of price index in relation to the analysis of price changes and the applicability of price indices to budget planning.

2.1 National Indices

Indices based on national bibliogaphies report the price trends in the book output of a single-geogreaphical area using the original publisher's price in the original currency. Consequently, national indices reflect the primary price rise.

Thus the figures in "Publishers' Weekly" report the changes in the book output and prices in the USA. Taking 1975 as the base year, title output in 1985 (approximately 50,000 titles) reached an index value of 127 while in the same period the average price for hardcovers and trade paperbacks rose to $31.46 and $13.98 respectively, that is index values of 194 and 267. Interpretaion of the figures must take into account imported titles – 15% in 1985.

Trends in literature production and prices in the UK are reported in the figures produced by the "Bookseller". The LAR index based on BNB has ceased to appear, since the number of entries with no price details grew to such an extent that the index values were no longer meaningful. According to the figures in the "Bookseller" title output increased to 53,000 between 1975 and 1985, ie and index value of 149. In same period, the average price reached £16.78, an index value of 349. Any interpretation of the Bookseller index needs to take into account the fact that imported English language books are included, in particular US titles sold through branches and supply centres at prices higher than the US domestice price, approximately 30% of the titles in the 1980's.

Book output and prices in the FRG are reported in "Buch und Buchhandel in Zahlen" based on information from the "Deutsche Bibliographie". While the number of titles rose to 57,000 between 1975 and 1985, giving an index value of 132, the average price (excluding paperbacks) rose to 43.96DM, an index value of 161.

From national indices it is possible to extract key data about literature output and prices by subject. Although price trends in individual subjects suffer occasional fluctuations, especially if the sample is small, the average prices for subject areas can be assigned to various price bands. Across the price range the expensive subject groupings in the scientific subject area can be clearly distinguished from the disciplines in the humanities and social sciences.

The applicability of national indices is resticted in many ways. For example, the dual coverage of a part of the Anglo-American literature output makes the national indices interdependent in their usefulness. In addition comparisons of national indices are made difficult through differences in classification or treatment of publications with less than 49 pages. While the creation of stards for price indices was still being seen as an urgent need at the 1982 IFLA Conference, "Criteria for Price Indices for Library Materials" (ISO/TC46/WG8N50) have now been developed by an ISO Working Group. The usefulness of national

indices in relation to budget projections for academic libraries is limited to a large extent by the fact that they include non-academic material but generally exclude grey literature.

2.2 Price Indices for Academic Books

2.2.1 Price Index for British Academic Books

Since 1974 CLAIM at Loughborough University has published an index based on BNB which reports exclusively on academic book prices in the UK and it showed that from 1974 to 1984 the average price rose to £18.14, an index value of 395. Since 1985 the index has had to be compiled on a different basis, as a result of the large increase in the number of entries without price details. Apart from the CLAIM index, the aim of the LIBER-project of 1977, which envisaged the development of price indices for academic literature in the individual European states, has not been realised.

2.2.2 Choice Index

A further type of index for academic literature is that of the American consumer group "Choice", which on the basis of the 6000 titles reviewed annually between 1978 and 1986 showed a price rise to an index value of 185.

2.2.3 US Periodicals Index (USPI)

USPI produced by the Library Materials Price Index Committee of the ALA took as its basis a sample of 3,700 academic titles from 1976 to 1986 and showed a price rise to $65, and index value of 289.

2.2.4 Vendor Indices

In the 1970's special studies were carried out in the FRG on the differentiated coverage of academic literature. As a consequence it was shown that recourse to the data from important library suppliers was an effective method of separating out academic literature. On the basis of approval plan data it is possible to compile selective and therefore meaningful price indices which report the trends in academic literature in individual publishing regions. Thus the British Academic Book Index is based on data from Blackwells, Oxford. Data from Blackwells N.A. is the basis for the Index of USA Academic Books produced by CLAIM. Both indices exclude imported titles and are mutually exclusive in their coverage of approximately 9,000 and 20,000 titles respectively. The North American Book Index uses data from various library suppliers. In the German speaking region an index is being developed using Harrassowitz's approval plan.

Vendor indices reflect the primary price rises for academic literature output in the respective publishing regions. There is still, however, the question of how comprehensive the coverage is as a result of the selection criteria of each approval plan. A further prerequisite for the usefulness of vendor indices is long term continuity in the range of material offered, irrespective of possible fluctuations in demand.

2.3 Local Indices

Local indices of individual libraries reveal, in contrast to national vendor indices, the price trends based on an individual acquisitions profile, which covers a section of the international academic literarure output. Local indices go beyond the primary price rises and document those secondary price-determining factors such as service charges, discounts, postal charges, customs duties, taxes, and above all fluctuations in the exchange rates of the major currencies, which are influenced to some extent by the choice of acquisition procedure and the policy of the supplier and to which particular attention should be paid.

In order to obtain meaningful planning data local indices must analyse price trends according to subject and type of literature – monograph or serial – excluding returns. Optimal data can come from computer-based acquisitions information which can go further and identify place of publication. The volume of acquisitions in a given subject should be high enough to prevent chance from becoming a significant factor. In addition to a consistent method of data collection the local index presupposes long term continuity in acquisition policy. As soon as the acquisitions policy is fundamentally changed in content or form, then the price trend reflects, by force of circumstance, a different set of titles.

Local indices, which cover the primary price rises and the influences of secondary pricing factors based on individual acquisitions profiles, and those indices which present exclusively the primary price rises of the whole or just of the academic literature output of a given region, are complementary. In particular, resource to meaningful vendor indices strengthens the argument when justifying budget projections to financing bodies.

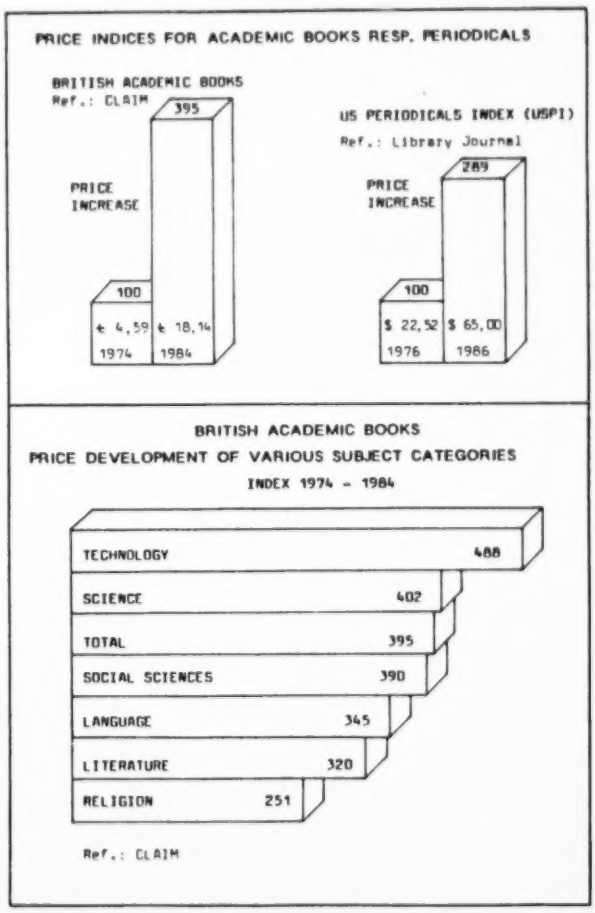
When using the local indices of other libraries for budget planning the comparison should take into account the special characteristics of the acquisitions profile on which the price structure and trends are based, as well as the given method of statistical analysis and acquisitions process.

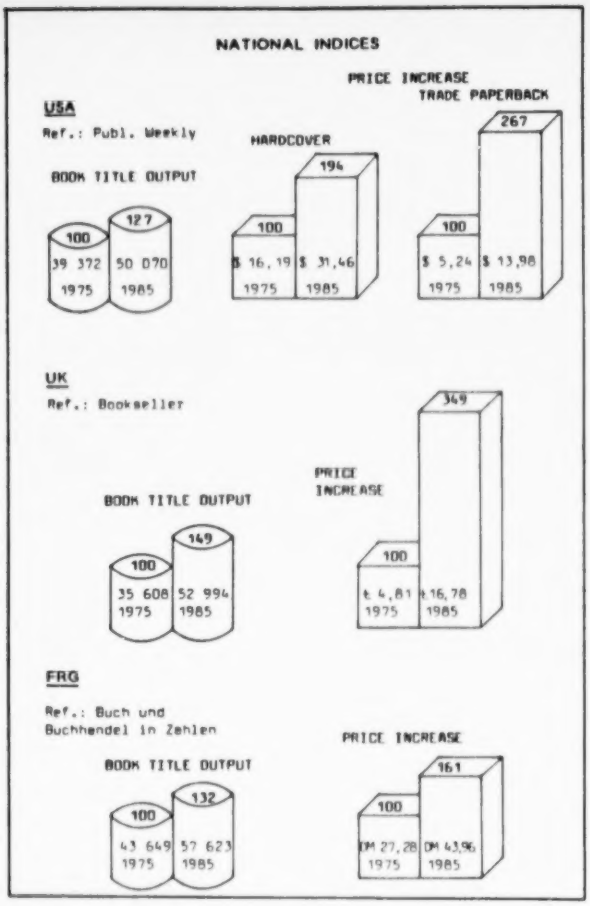
Although external data sources are used to advantage in a subsidiary way for budget planning, in the first instance libraries will still use the local index. This allows a differentiated interpretation of trends in the cost of acquiring new material. It reveals trends from which, with suitable caution, forecasts for budget planning can be made. On the basis of estimated future trends in costs the necessary increase in the overall budget can be determined.

The local index is furthermore a differentiated instrument of control. Overall budget planning has to maintain the balance in the acquisitions programme with reference to the fixed costs and the open expenditure on monographs and in doing so recourse can be made to the local index which analyses the different trends in the costs for the different types of material – in particular serials and monographs. Since individual subject areas are affected to differing degrees by the primary price rises, budget planning especially in university libraries become a question of quantifying the uneven price trends across the whole range of subjects and taking this into account when allocating the budget to those subject areas. In so far as the allocation model is orientated towards the "literature-size approach" the necessary corrective can be introduced into the budget distribution model by applying the "price" parameter.

3. Overview

There is a pressing need to establish differentiated reporting of price trends in the individual publishing regions – a task which can only be fulfilled through international cooperation. Meaningful and statistically reliable data are a prerequisite for ensuring that academic libraries can demonstrate effectively the loss of purchasing power and the continuing erosion of library budgets, ie make a convincing case for the projected budgets considered necessary to maintain literature provision.





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IFLA

IFLA General Conference Brighton
Division: Collections and Services
Section: Acquisition and Exchange

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INFORMATION BASIS OF INTERNATIONAL BOOK EXCHANGE

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For distribution

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Z.Sorokina

Information basis of international book exchange.

Abstract

The knowledge of professional experience of libraries in the field of international book exchange (IBE) is both important and interesting. Information on published materials dealing with major issues of IBE, on the trends and achievements in this important field of library work and the possibilities of expanding IBE, is contained in general library and scientifico-technical publications, and guides to periodicals of different countries. The development of IBE, the growing number of publications, and the importance of documentary sources for the practical work of IBE personnal, have made systematic work on bibliographing literature on IBE essential. The three volumes of bibliographical indexes on IBE,prepared in keeping with IFLA's decision, cover literature put out in 1817-1980. These bibliographical indexes speak of the diversity of types of publications devoted to the IBE. In order to more fully gather data on new works and make this information more effective , it is feasible to find forms of regular analysis of the more important works. The timely appearance of such surveys will favour the development of book exchange between libraries of different countries and will help specialists to orient themselves in research projects, which have already been realized and reveal questions,which have not yet been studied. All this will,undoutedly, aid further research in this field.

INFORMATION BASIS OF INTERNATIONAL BOOK EXCHANGE

It seems rather important and useful to learn about the experience of other libraries in the field of international book exchange. All employees engaged in book exchange work need information on the materials on the most important problems of the international book exchange which have been put out, on its tendencies and achievements. Information in the form of documents is important both at the organisational stage of the book exchange and for research work so as to determine the range of issues in the field of the international book exchange which have already been studied. The study of printed works not only helps one to update his knowledge, but also promotes the book exchange among the libraries of different countries. So the information requirements of the librarians engaged in book exchange are broad and varied and can be satisfied with the help of all types of publications.

The international book exchange has long become the object of research. Many years of collecting bibliography on the international book exchange have shown that the number of works in this field does not dwindle. Articles and full-length works published within the period from 1877 to 1980, of which there are over 3,000, form a formidable collection which requires summing up. Every year new works are added to this collection which it is very difficult to generalize for all the articles and works are scattered in various publications.

According to statistical data, in the period from 1960 to 1980 an average 46 works on this subject were published every year. A certain idea of the number of works published on this subject one might get from the bibliographical indices compiled in accordance with the plan of work of the IFLA Acquisition and Book Ex-

change Section[x]. However, there are certain difficulties involved in the collection of information concerning works published in some countries, so it is quite possible that some of the articles and works have failed to be included in these bibliographies.

One can find the first mention of the book exchange between libraries in periodical editions of various sorts: general-purpose magazines, library and bibliographical publications and specialised magazines. These early publications of the I9th century mostly concerned the contacts between scientists and researchers who were eager to inform their colleagues about their successes.

The development of the international book exchange is accompanied by the growing activity of individual countries and international organisations who began to study the questions of the international book exchange and spread information on this important subject. Specialists from various countries strive to inform the public about the book exchange between local libraries as an important form of international cultural ties. The number of works published in various countries ranges from one to ten. The greatest number of books on the subject have been published in the Soviet Union, the United States and Great Britain.

Such international organisations as IFLA and UNESCO are making a tangible contribution to the development of the international book exchange. Only in the '80s the IFLA publications included 8I works on this theme, while those of UNESCO - 36. These are mostly such journals as IFLA Annual, UNESCO Bulletin for Libraries, and

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x Kanevsky B.P., Vamvijngaorden FL.J. Schanges Internationaux de Publications: Bibliographie I960-I970. Bruxolles, Commission Belge de Bibliographie, I974. -63p.- /Bibliographie Belgica, I27/; Mezhdunarodny Obmen Izdaniyami. International Exchange of Publications, Bibliography I97I-I980 /Compiled by V. Alberani, B. Kanevsky and G. Verbovaya./ Moscow, Lenin State Library, I983, 63 pages.

IFLA Journal.

Among other organisations which devote much attention to the questions of the international book exchange mention should be made of the following: the international loan department of the British Museum, US association of medical libraries, national parliamentary library of Japan, US Congress library, Lenin State Library of the USSR and the library of the USSR Academy of Sciences.

These are journals which have made the publication of articles on the problems of book exchange a common practice.

Gradually researchers begin to group around the basic professional library journals. Among the magazines which regularly print articles on book exchange are Bibliotekovedenie i Bibliografiya za Rubezhom /Library Science and Bibliography Abroad, USSR/; Bollettino d' informazioni AJB /Italy/; Bulletin of the Medical Library Association, Library Journal, Interlending Review, Library Resources and Technical Services, and Special Libraries.

Since 1977 a special journal entitled Library Acquisitions: Practice and Theory began to be put out in the United States. It also deals with the problems of book exchange as one of the sources of book acquisition.

So the majority of works on the international book exchange are articles in periodical publications. However, in the recent years the types of publications devoted to the problems of the international book exchange became increasingly varied. Now among them are full-length works, collections of articles, documents of international conferences, and booklets, many of which are of international significance. Among the latter are the Studies in the International Exchange of Publications,[x] Handbook in the International Exchange of Publications,[xx] and the book by V. Popov

[x] Studies in the International Exchange of Publications, Ed. by P. Genzel, Munchen, 1981, 125 pages. /Continued/

put out in Bulgaria and devoted to the theoretical aspects of the international exchange of publications.[xxx]

From these works the employees engaged in the international exchange of publications will learn a lot of useful things to be used in their work. Of particular interest for specialists in the international exchange of publications might be the works on the following themes: the economic aspects of the international book exchange; the exchange in duplicates; the interaction between the book exchange and the lending service; the exchange of official publications; UNESCO conventions and the development of the international exchange in publications; the international exchange in publications and the programme "General Availability of Publications".

The development of theory and practice in recent years, the unceasing flow of new publications in the field of book exchange, and the importance of documentary sources for the work of specialists have made it imperative to proceed with compiling a bibliography of the publications devoted to the international exchange of publications.

The publishing of three issues of the bibliographies on the international exchange in publications was met with enthusiasm by the specialists in this field, who considered them an important prerequisite for the further development of theory and practice and a reliable basis for the successful activities of the future specialists in the international exchange of publications. Today the only way to spread information about the research work already carried out is regularly to print a thematic index.

[xx] Handbook on the International Exchange of Publications - Manuel des Echanges Internationaux de Publications - Manual del Canje International de Publicationes, 3rd ed. Edited and rev. by Cisola Von Busse, Paris: UNESCO, 1964, 767 pages.

[xxx] Popov V. Mezhdunaroden obmen na izdania mezhdu bibliotekite: sushchnost, pravno regulirane, svremenni problemi. Teoretichni aspekti, Sofia, 1983, 177 pages.

While working over the indices, the compilers encountered certain difficulties in selecting publications resulting from the great degree of scattering of the information sources. For instance in 1980 alone 34 articles on the international book exchange were published in 19 periodicals.

Often these periodicals and publications are of low circulation and thus not easily available. Their language too sometimes poses certain difficulties. All this might lead to the omition of certain publications on the international book exchange from the indices. It is possible to ensure that the bibliographies on the international exchange of publications are complete by regularly printing bibliographical reviews in the library periodicals. This will guarantee the timeliness of the information, its comprehensive character, the selection of the most valuable and interesting sources, the use of various genres./thematic indices, reviews, lists of new publications/ and methods of publication descriptions.

For the readers this information is more easily available, than separate bibliographies.

Upon the decision of the Section on the acquisition and the international exchange of publications the 51st IFLA session started work on compiling the 4th edition of the bibliographical index on the international exchange of publications. The review of the librarianship and bibliographical editions which may contain publications on the international book exchange demonstrates that in spite of the fact that specialists are still interested in the subject the number of works devoted to it is on the decline. This is probably the result of the commercial attitude to the library work, cuts in the library budgets and the constantly mounting prices for the printed matter. All these factors stand in the way of successful cultural ties, including the international exchange of publications. Of particular importance in these conditions are

research works into new problems pertaining to the development of fruitful and mutually advantageous ties between libraries of different countries. It is of great importance to learn about these works and in time to inform all the interested librarians engaged in book exchange.

In addition to information about new publications the employees dealing with the international exchange of publications are in constant need of information about the possibilities to expand the exchange of books. One can find such an information in general library and scientific-technical editions and in reference periodicals on individual countries. The exchange of publications was greatly promoted by the UNESCO Journal of Information Science, Librarianship and Archieves Administration /formerly Bulletin for Libraries/ which regularly published information on organisations willing to take part in the exchange of publications. Now, after the journal was closed, the librarians have no information of this kind. The lack of sufficient information on the possibilities of expaning book exchange greatly impedes the process. The libraries which are interested in the establishment of book exchange ties have to review many reference books on research institutions, academies, libraries as well as those periodicals which contain data on the activities of scientific and technical societies, organisations and publishing houses. The UNESCO journal helped the librarians to make the first, most difficult step - to find organisations engaged in the exchange of publications.

In conclusion it is worth pointing out that the information requirements of specialists in the international exchange of publications are rather complicated in structure, for they are determined not only by their professional aims but also by their desire to add to their knowledge. The international exchange of publications can be divided into separate operations and each of these

operations requires documentary sources of information. Of special importance for the successful international exchange of publications is the timely information about the printed matter put out by the publishing houses. The level of the availability of the bibliographical sources requires special analysis. This article is an attempt to analyse some methods of getting information about documents the timely study of which will make it possible to be in the forefront of the international exchange of publications, to follow the tendencies of its development and to organise research work into this field.

The availability of timely and complete information for the libraries and centres engaged in the international exchange of publications would promote the consolidation of ties between the libraries and the solution of tasks facing them.